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Report Highlights:

Canada's commercial catch for all seafish and shellfish in 2005 reached 1,072,288 metric tons (MT) live weight, down 5.1 % from the revised 2004 level of 1,130,260 MT. After two years of successive decline, the total Canadian farmed-raised production of finfish and shellfish was higher during 2005. Total aquaculture production reached 153,995 MT, up more than 6% from the year earlier. For the first time in five years, the value of Canadian imports of U.S. fish and seafood during 2006 registered a year-to-year decline, slipping almost 2% to \$665 million from \$678 million in 2005.

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Includes Trade Matrix: Yes
Annual Report
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[CA]

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Executive Summary

THIS REPORT DOES NOT CONTAIN OFFICIAL USDA DATA

* Canada's commercial catch for all seafish and shellfish in 2005 reached 1,072,288 metric tons (MT) live weight, down 5.1 % from the revised 2004 level of 1,130,260 MT. Most of the decline was attributable to a lower shellfish catch.

* After two years of successive decline, the total Canadian farmed-raised production of finfish and shellfish was higher during 2005. Total aquaculture production reached 153,995 MT, up more than 6% from the year earlier reflecting a moderate increase in total finfish output. Salmon production rose to 98,441 MT, 2% above 96,774 MT a year earlier. Farm-raised shellfish production during 2005 reached 38,195 MT, up 1% from 37,925 MT tons during 2004.

* For the first time in five years, the value of Canadian imports of U.S. fish and seafood during 2006 registered a year-to-year decline, slipping almost 2% to \$665 million from \$678 million in 2005. Despite the decline, Canada remained the No. 3 export market for U.S. fish and seafood exports.

* In 2006, Canadian fish and seafood importers sourced more Asian product than ever before. During that year, the volumes imported from China, Thailand, and Vietnam increased 7%, 9%, and 18% respectively from the year earlier levels.

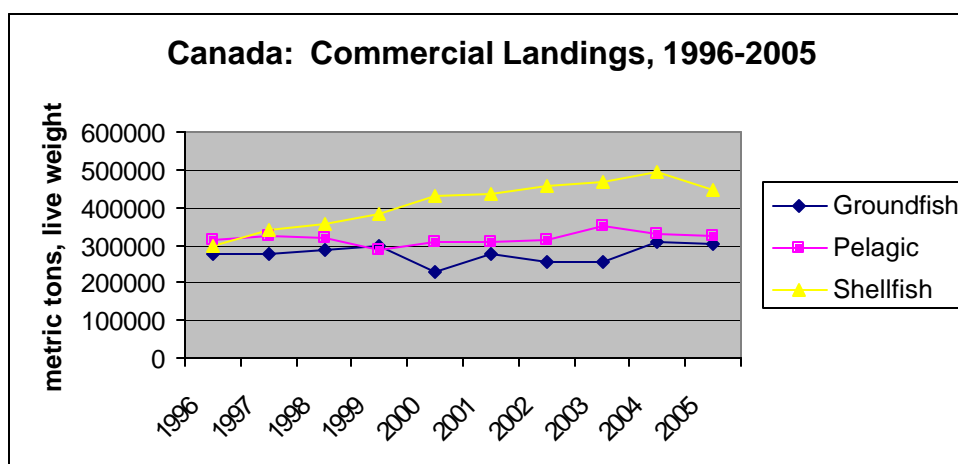
* Competition from Asian suppliers reduced the U.S. share of the Canadian import market for fish and seafood to 31% in the January to June period of the current year from a recent historical share of about 45%.

* Total Canadian fish and seafood exports in 2006 failed to keep up the record pace established during 2005, slipping 1% to 620,912 MT during 2006 from 626,759 MT in 2005. Canadian sales to the three top export markets over that period, the U.S., China, and Japan were all lower. Much of the decline, a trend that is continuing in the current year, can be partly attributed to the sharp appreciation in the Canadian dollar over the period.

Section I. Production; Commercial Catch

Fisheries and Oceans Canada's current data availability covers Canada's total commercial fish and shellfish catch up to 2005. The total Canadian commercial catch for all fish and shellfish species in 2005 reached 1,072,288 MT live weight, down 5.1 % from the revised 2004 level of 1,130,260 MT. Most of the decline was attributable to a lower shellfish catch particularly for scallops, which registered a sharp decline during 2005, but the pelagic and other finfish catches were also lower.

The chart below illustrates how during the last ten years, the Canadian shellfish catch has overtaken each of the groundfish and pelagic fish catches. Despite the fact that the shellfish catch was lower in 2005, the average annual growth rate (AAGR) for the Canadian shellfish catch since 1996 is 4%. This compares to an AAGR of 1.0% for groundfish and 0.4% for pelagic over the same time period.



Canada's Commercial Catch**Canada: Fish & Shellfish Commercial Catch**

Landings in Metric Tons Live Weight

SPECIES	2003 Revised	2004 Revised	2005 Prelim.
Groundfish	255,614	306,693	304,286
Pelagic & Other Finfish	348,728	331,687	324,465
Shellfish	466,742	491,880	443,537
SUBTOTAL	1,071,084	1,130,260	1,072,288
Other:			
Marine Plants, Roe, etc.	48,977	45,969	24,357
FISHERY TOTAL	1,120,061	1,176,229	1,096,645

Source: DFO & Post

Landings, By Species, 2005

2005 ATLANTIC & PACIFIC COASTS COMMERCIAL LANDINGS, BY PROVINCE
(metric tonnes, live weight)

	Nova Scotia	New Brunswick	PEI	Quebec	Nfld.	Total Atlantic	British Columbia	Total Canada
Groundfish								
Cod	7,062	398	277	2,162	16,257	26,156	1,537	27,693
Haddock	20,161	3	0	0	267	20,432	0	20,432
Redfish spp.	7,976	5	0	220	7,807	16,008	18,265	34,273
Halibut	1,082	69	15	155	427	1,749	6,692	8,441
Flatfishes	2,271	25	237	734	17,070	20,337	22,397	42,733
Greenland turbot	722	104	0	3,072	11,721	15,619	0	15,619
Pollock	7,495	78	0	0	508	8,081	1,878	9,959
Hake	13,863	20	1	8	2,122	16,015	104,189	120,204
Cusk	901	0	0	0	4	905	0	905
Catfish	111	0	0	1	0	112	0	112
Skate	257	0	0	22	1,510	1,789	1,801	3,591
Dogfish	2,202	66	0	0	1	2,270	5,433	7,702
Other	2,941	7	10	8	1,756	4,720	7,901	12,621
Total	67,043	775	541	6,383	59,451	134,193	170,093	304,286
Pelagic & other finfish								
Herring	54,730	62,671	15,089	5,267	25,506	163,263	28,778	192,041
Mackerel	4,939	1,504	4,948	1,198	42,693	55,282	1	55,283
Swordfish	1,552	0	0	0	32	1,584	0	1,584
Tuna	884	0	176	0	33	1,093	3,677	4,770
Alewife	93	2,821	135	0	0	3,048	0	3,048
Eel	7	102	57	0	60	226	0	226
Salmon	0	0	0	0	0	0	27,190	27,190
Smelt	4	621	135	0	1	761	0	761
Capelin	0	0	0	339	36,365	36,704	0	36,704
Other	354	22	270	2	30	678	2,181	2,859
Total	62,562	67,741	20,809	6,806	104,721	262,639	61,827	324,465
Shellfish								
Clams/quahaugs	8,211	989	1,519	1,849	13,647	26,216	2,282	28,497
Oyster (1)	168	337	2,740	0	0	3,245	0	3,245
Scallop (2)	47,578	2,810	354	1,229	5,180	57,151	25	57,176
Squid	18	0	0	0	536	554	0	554
Mussel (3)	0	104	0	7	0	111	0	111
Lobster	29,127	7,278	8,307	3,393	2,616	50,721	0	50,721
Shrimp	28,556	6,557	0	17,422	114,852	167,386	2,883	170,269
Crab, Queen	15,608	16,136	3,428	16,219	43,957	95,347	0	95,347
Crab, Other	1,802	2,373	2,999	2,212	1,039	10,426	5,403	15,829
Sea urchin	360	1,236	0	100	495	2,191	4,135	6,326
Other	2,477	1,769	35	1,624	7,763	13,668	1,794	15,462
Total	133,904	39,589	19,383	44,054	190,086	427,016	16,521	443,537
Seafish/Shellfish	263,509	108,105	40,733	57,243	354,258	823,848	248,440	1,072,288
Marine plants	0	2	0	0	0	2	0	2
Lumpfish roe	0	0	0	63	1,271	1,334	0	1,334
Miscellaneous	4,702	11,154	5,141	0	1,944	22,941	80	23,020
Total	4,702	11,156	5,141	63	3,215	24,277	80	24,357
GRAND TOTAL (4)	268,211	119,261	45,873	57,306	357,472	848,124	248,520	1,096,645

(1) Oyster: BC data now reported under Aquaculture. Atlantic includes wild and farmed data.

(2) Scallop includes meat with roe.

(3) PEI mussels are now classified under "aquaculture" because they are a farmed product.

(4) Totals may not add up due to rounding.

Source: DFO, Ottawa

Section II. Aquaculture

Canadian aquaculture statistics are available up to 2005. The Department of Fisheries and Oceans anticipates the 2006 production totals to be available during the final quarter of calendar year 2007. After two years of successive decline, the total Canadian farmed-raised production of finfish and shellfish was higher during 2005. Total production reached 153,995 MT, up more than 6% from the year earlier reflecting a moderate increase in total finfish output. Salmon output rose to 98,441 MT, 2% above 96,774 MT a year earlier. Farm-raised shellfish production during 2005 reached 38,195 MT, up 1% from 37,925 MT tons during 2004.

CANADIAN AQUACULTURE PRODUCTION, 2001-2005

Units: metric tons

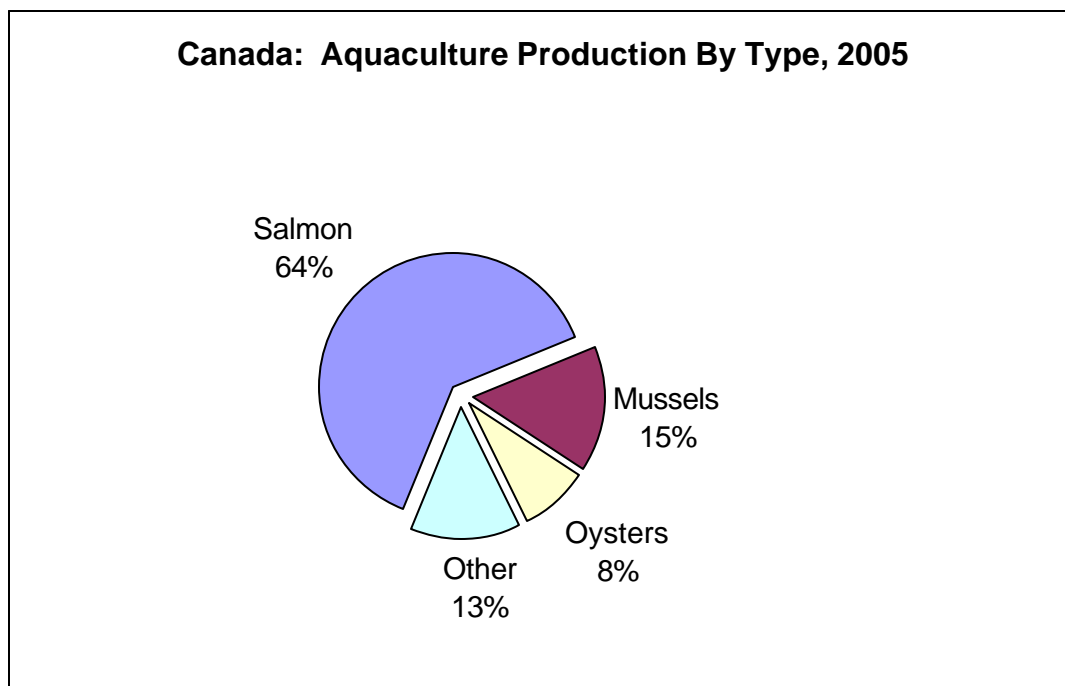
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>
Salmon	105,606	126,321	99,961	96,774	98,441
Trout	6,513	6,833	5,253	4,871	4,723
Steelhead	4,705	2,034	1,150	-	-
Other Finfish	1,604	1,567	7,352	5,448	12,636
Total FinFish	118,428	136,755	113,716	107,093	115,800
Clams	1,400	1,500	1,589	1,528	1,788
Oysters	11,319	11,520	13,621	12,645	12,584
Mussels	21,515	20,572	20,590	22,857	22,930
Scallops	118	106	95	87	61
Other Shellfish	549	578	594	808	832
Total Shellfish	34,901	34,276	36,489	37,925	38,195
Total Aquaculture	153,329	171,031	150,205	145,018	153,995

* full name: Newfoundland and Labrador

Source: Statistics Canada

Aquaculture Production By Type

Canadian aquaculture production is dominated by the production of farmed-raised salmon, mussels and oysters, which combined, accounted for 87% of total farmed-raised production in 2005. On a regional basis, British Columbia, New Brunswick and Prince Edward Island accounted for 48%, 24%, and 12% respectively of total farmed-raised output.



Section III. Consumption

According to Statistics Canada, total Canadian fish and seafood per capita consumption during 2006 rose fractionally from the year earlier level to 9.36 kg. Despite the small gain, the per capita level in 2006 was 4.5% below the record level set in 2003. The StatCan figures show that per capita shellfish consumption has declined annually over the five year period ending 2006 while the consumption of fresh and frozen seafish and freshwater fish increased.

Per Capita Consumption

Canada: Fish & Seafood Per Capita Consumption

Period: 1996, 2001-2006

Units: kilograms, edible weight

	<u>1996</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>
Seafish							
-Fresh & Frozen	4.49	4.39	4.01	4.43	3.94	4.04	4.09
-Processed	1.97	2.67	2.96	2.81	2.74	2.90	2.87
Shellfish	1.66	2.12	2.17	2.03	1.93	1.90	1.89
Freshwater Fish	0.30	0.47	0.43	0.53	0.51	0.47	0.50
TOTALS	8.42	9.65	9.55	9.80	9.11	9.32	9.36

Note: Totals may not add due to rounding

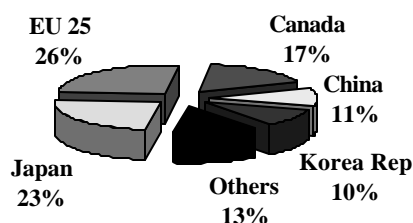
Source: Statistics Canada

Section IV. Trade

For the first time in five years, the value of Canadian imports of U.S. fish and seafood during 2006 registered a year-to-year decline, slipping almost 2% to \$665 million from \$678 million in 2005 (see table, next page). Despite the decline, Canada remained the No. 3 market for U.S. fish and seafood exports. Using trade statistics compiled by the U.S. Bureau of Census, Canada was third after the EU25 and Japan and accounted for 17 % of all U.S. fish and seafood exports valued at \$4.0 billion in 2006. Further information about the U.S. seafood trade situation with Canada and the composition of Canadian imports of U.S. fish and seafood is presented elsewhere in this Trade Section.

Canada: An Important Market for U.S. Fish & Seafood Exports

Total U.S. Fish & Seafood Exports in Calendar Year 2006,
\$4.0 billion



The Canadian Import Market for Fish & Seafood

Total Imports

On a value basis, spurred partly by increasing demand and by the stronger purchasing power of a rising Canadian dollar, total Canadian imports of fish and seafood climbed a further 8% percent during the first half of 2007 from the record level for that period set one year ago. However, the value of imports from the United States was down during 2006 for the first time in several years and continued to be lower during the first half of 2007. As shown in the table below, competition from China and other countries increased sharply and reduced the U.S. share of the Canadian import market for fish and seafood to 31% in the January to June period of the current year from a recent historical share of about 45%. For more information on Canadian fish and seafood imports from China, see last year's report CA6047 and the section entitled *China Emerges as a Major Supplier in the Canadian Seafood Market*.

Total Canadian Fish and Seafood Imports, By Country

Value in Millions of US dollars

						Jan-June 2006	Jan-June 2007	% change 07/06	
	2002	2003	2004	2005	2006	2006	2007		
-- The World --	-	1,286.2	1,371.7	1,479.3	1,603.3	1,727.6	706.9	762.3	8%
United States	577.0	610.8	644.0	678.1	665.2	236.3	236.1	0%	
China	92.7	135.6	202.3	262.9	304.4	132.2	142.5	8%	
Thailand	203.2	214.7	190.0	201.8	235.1	107.2	115.5	8%	
Chile	26.8	46.0	52.8	58.0	81.3	37.7	44.8	19%	
Vietnam	21.8	30.2	55.9	69.0	78.9	28.8	38.8	35%	
India	24.8	36.2	42.3	42.1	51.7	22.1	25.4	15%	
Russia	37.2	40.4	27.1	13.1	28.2	12.1	15.3	27%	
Norway	47.5	24.8	20.6	23.9	23.8	10.1	11.8	16%	
Taiwan	16.4	16.7	20.0	20.3	18.7	9.9	8.8	-11%	
Indonesia	16.0	17.6	15.9	22.0	18.0	9.3	9.9	6%	
Philippines	17.4	15.6	21.6	17.7	17.5	6.3	8.8	39%	
Japan	9.3	9.7	11.5	13.1	15.5	7.5	10.1	35%	
ROW ex US & China	616.6	625.3	632.9	662.3	758.1	338.5	383.6	13%	

% share of Canadian Import Market

United States	45%	45%	44%	42%	39%	33%	31%
China	7%	10%	14%	16%	18%	19%	19%
ROW	48%	46%	43%	41%	44%	48%	50%

HS Codes

0302; 0303; 0304; 0305; 0306; 0307

1603; 1604; 1605

Source: World Trade Atlas & Statistics Canada

Total Imports by Quantity

Total Canadian imports of fish and seafood (excluding live) by volume are shown below. The table excludes imports of live imports for which only value figures are collected. While the size of the Canadian import market for fish and seafood increased during 2006, lower volumes were imported from the United States as Canadian seafood importers turned increasingly to offshore offerings. This development is partly a reflection of a strengthening Canadian dollar and partly an indication that importers in Canada are sourcing more Asian produced species to meet retail demand.

Canadian Imports of Fish and Seafood from Top Suppliers

Quantity Basis, MT

January - December

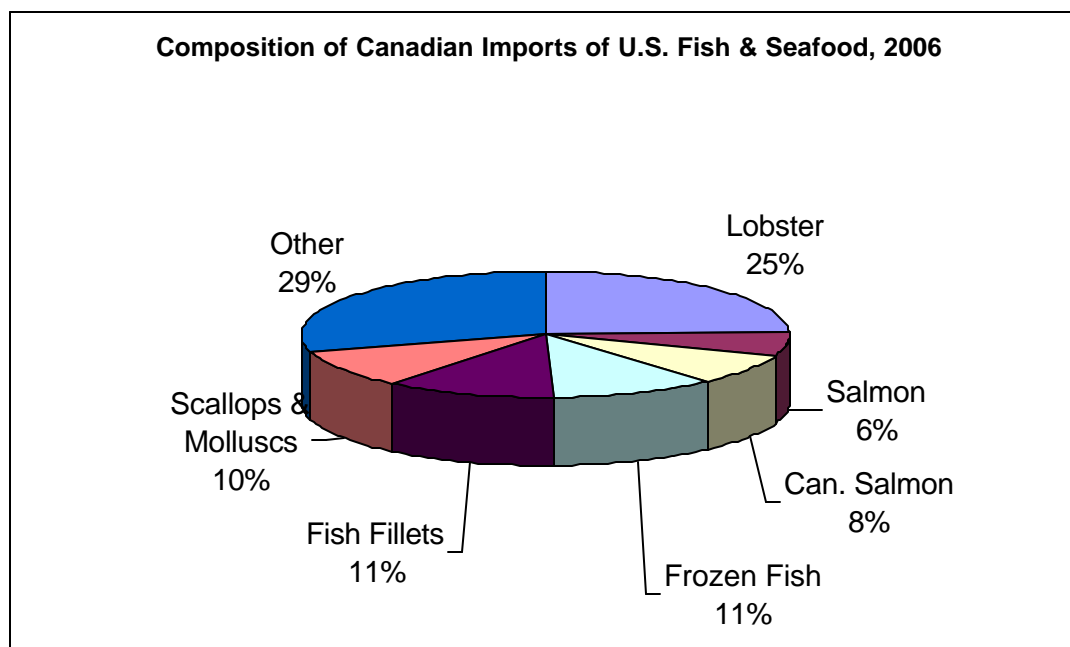
Country	2004	2005	2006	
-- The World --	319,254	315,155	317,572	0.8%
United States	141,494	131,739	123,921	-5.9%
China	45,070	53,233	56,801	6.7%
Thailand	39,612	43,581	47,382	8.7%
Vietnam	7,870	9,411	11,119	18.1%
Chile	9,131	9,268	10,783	16.3%
Taiwan	6,712	6,882	7,091	3.0%
India	6,116	6,260	6,554	4.7%
Norway	7,504	6,739	6,304	-6.5%
Philippines	9,161	6,163	5,701	-7.5%
Russia	8,912	2,333	3,494	49.8%
Denmark	205	1,547	2,412	55.9%
Others	37,467	37,999	36,010	-5.2%

HS 03; excluding 0301(live); 1603; 1604

Derived from World Trade Atlas

The Composition of Canadian Imports of U.S. Fish & Seafood

On a value basis, Canadian imports of lobster were the leading import of U.S. fish or seafood in 2006, followed by frozen (whole) fish and fish fillets as illustrated on the graph below. However, according to a 2002 study by L.B.C. Consulting Services, commissioned by the Office of Agricultural Affairs, only about 20% of the fresh or frozen whole fish that Canada imports from the United States is re-sold "as is" to retail or foodservice channels. The balance is imported by Canadian processors for further processing, and L.B.C. reports that a significant share is then exported as Canadian product.



Total Exports

Total Canadian fish and seafood exports in 2006 failed to keep the record pace established during 2005, slipping 1% to 620,912 MT during 2006 from 626,759 MT in 2005. Sales to the three top export markets over that period were lower: to the U.S., down 5%, to China, down 2%, and to Japan, down 33%. Much of the decline, a trend that is continuing in the current year, can be attributed to the sharp appreciation in the Canadian dollar over the period. From its level at January 2005 of US\$0.816, the Canadian dollar rose 16.7% to US\$0.952 by July 2007. In contrast, on a value measure, Canadian fish and seafood exports increased 3.4% to \$1.9 billion in the first seven months of 2007 but the fall in volume was 6% as shown on the following table. Note: Since July 2007, the Canadian dollar appreciated further to US\$0.990.

Canada: Total Fish and Seafood Exports

Units: Metric tons

	2004	2005	2006	% change 06/05-	January - July 2006	2007	% change 07/06
-- The World --	596,103	626,759	620,912	-1%	337,329	317,559	-6%
United States	308,688	306,850	291,471	-5%	174,776	170,750	-2%
China	62,679	75,969	74,566	-2%	37,658	29,547	-22%
Japan	57,492	66,917	45,094	-33%	25,288	21,488	-15%
Denmark	22,657	27,611	32,199	17%	21,123	21,848	3%
Russia	14,731	19,964	23,115	16%	12,099	10,884	-10%
Ukraine	3,327	9,371	14,866	59%	4,124	3,139	-24%
Korea, South	12,258	7,376	11,540	56%	4,299	3,477	-19%
Hong Kong	5,176	7,572	9,846	30%	4,425	2,963	-33%
Spain	10,785	7,025	9,452	35%	4,531	3,917	-14%
Taiwan	6,677	7,796	8,102	4%	4,602	1,656	-64%
United Kingdom	8,989	8,577	7,516	-12%	3,674	4,123	12%
All Others	82,645	81,730	93,143	14%	40,728	43,768	7%
% share to U.S.	52%	49%	47%		52%	54%	

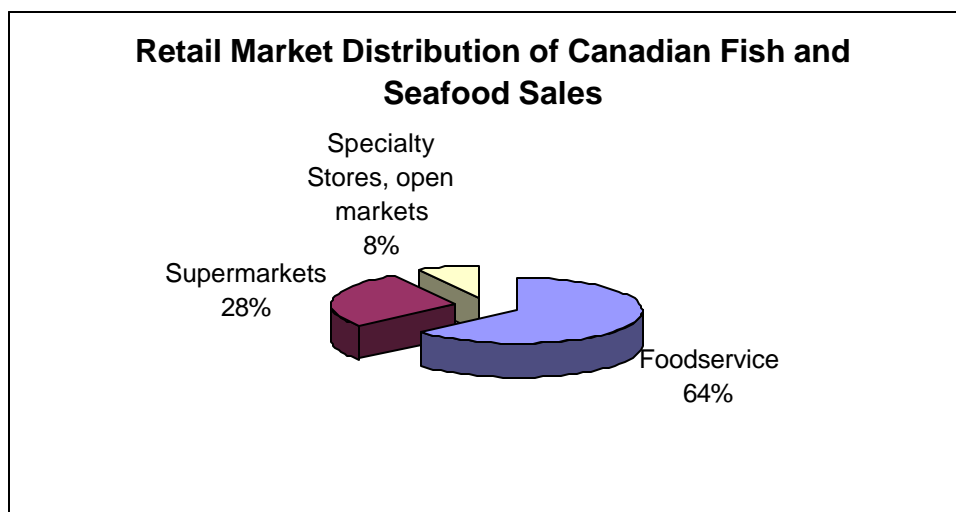
HS codes: 03; 1603; 1604

Source: Derived from World Trade Atlas

Section VI. Marketing

Distribution of Retail Fish and Seafood Sales

According to the 2002 report by L.B.C. Consulting Services of Montreal (contracted by the Office of Agricultural Affairs, see CA2078), the foodservice sector at that time accounted for an estimated 64% of total Canadian retail sales of fish and seafood. While there has been no published update since that time, there is general consensus in the industry that, over the past five years, the foodservice share has advanced to about two-thirds, by value, reflecting the popularity of more Asian and other ethnic meals served in restaurants that contain fish and seafood.



Section VII. Trade Matrices

Groundfish

Groundfish - Canada - Imports -Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	32,707	23,656	19,530	-17%
United States	11,332	7,122	4,466	-37%
Taiwan	2,588	3,579	3,800	6%
China	3,488	4,022	3,572	-11%
Russia	8,185	1,592	1,319	-17%
India	842	1,228	1,028	-16%
Norway	2,373	1,499	853	-43%
Vietnam	484	352	435	24%
Philippines	175	205	433	111%
All Others	3,240	4,057	3,623	-11%

Groundfish - Canada - Exports -Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	45,724	53,945	59,762	11%
United States	18,224	20,740	16,691	-20%
Ukraine	2,833	6,803	11,778	73%
China	1,587	5,883	10,346	76%
Spain	7,768	3,979	5,986	50%
Russia	7,005	10,002	4,926	-51%
Lithuania	2,198	975	1,601	64%
Korea, South	1,803	367	1,271	246%
United Kingdom	1,163	633	1,259	99%
Germany	181	481	1,167	143%
All Others	2,962	4,081	4,736	16%

Source: Derived from World Trade Atlas

Groundfish Fillets

Groundfish Fillet Imports - Canada - Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	18,023	17,653	16,702	-5%
China	10,773	11,463	11,739	2%
United States	5,678	4,547	3,429	-25%
United Kingdom	823	731	697	-5%
Norway	340	243	191	-21%
Thailand	2	102	149	45%
New Zealand	150	126	101	-20%
Poland	-	13	82	533%
Hong Kong	-	1	59	5622%
Russia	78	86	54	-37%
All Others	180	341	201	-41%

Groundfish Fillet Exports - Canada - Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	10,955	7,494	8,414	12%
United States	9,827	5,244	7,309	39%
China	70	1,650	498	-70%
Korea, South	308	11	252	2139%
Ukraine	40	33	146	347%
United Kingdom	-	-	44	-
Switzerland	218	100	38	-62%
Germany	5	29	38	33%
Thailand	28	-	25	-
Portugal	36	163	25	-85%
Italy	18	6	19	212%
Russia	327	109	19	-83%
All Others	79	148	1	-99%

Source: Derived from World Trade Atlas

Flatfish

Flatfish - Canada - Imports -Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	10,228	8,132	7,826	-4%
United States	9,553	7,872	7,365	-6%
China	175	122	191	56%
Netherlands	32	51	88	72%
Norway	3	2	35	2044%
Japan	10	5	29	524%
India	33	5	28	512%
Korea, South	1	3	18	523%
Honduras	-	-	16	-
All Others	421	73	57	-22%

Flatfish - Canada - Exports -Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	15,484	24,328	20,616	-15%
United States	9,793	9,896	7,081	-28%
China	2,603	8,263	6,483	-22%
Japan	1,660	3,297	3,243	-2%
Hong Kong	97	601	1,687	181%
Taiwan	788	1,365	676	-50%
Spain	30	47	307	548%
Korea, South	38	211	306	45%
United Kingdom	230	260	249	-4%
Germany	50	53	181	245%
Sweden	32	112	99	-12%
Russia	48	86	80	-6%
All Others	114	137	222	63%

Source: Derived from World Trade Atlas

Roe

**Roe, Caviar, Liver - Canada - Imports -Total-
Quantity
metric tons**

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	639,618	467,641	366,090	-22%
United States	571,444	422,010	269,324	-36%
United Kingdom	2,758	4,278	36,372	750%
Japan	5,512	13,947	35,882	157%
Iceland	3,409	708	4,886	590%
China	4,331	750	4,373	483%
St. Pierre & Miquelon	-	-	4,296	#DIV/0!
France	234	407	2,792	586%
Spain	1,642	1,507	1,783	18%
Germany	624	1,082	1,304	21%
Norway	18,631	7,277	1,145	-84%
All Others	31,033	15,675	3,933	-75%

**Roe, Caviar, Liver - Canada - Exports -Total-
Quantity
metric tons**

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	11,459	12,658	10,377	-18%
Japan	8,007	8,981	6,259	-30%
China	1,174	1,139	1,949	71%
United States	419	1,100	697	-37%
Sweden	699	455	372	-18%
Germany	165	194	280	45%
United Kingdom	438	270	264	-2%
Denmark	199	161	147	-8%
Iceland	68	36	61	70%
Finland	57	35	57	60%
Hong Kong	26	12	54	333%
All Others	0	0	0	-14%

Source: Derived from World Trade Atlas

Lobster

Lobster - Canada - Imports -Total-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	15,918	15,746	17,537	11%
United States	15,120	15,065	16,788	11%
Bahamas	201	106	159	51%
Haiti	125	152	142	-6%
Cuba	180	119	85	-29%
Iceland	19	7	50	584%
United Arab Emirates	17	61	48	-22%
Brazil	43	29	40	37%
Oman	-	28	28	-1%
All Others	213	178	197	11%

Lobster - Canada - Exports -Domestic-
Quantity
metric tons

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	38,754	37,190	40,217	8%
United States	29,449	28,474	29,396	3%
Belgium	1,397	1,645	2,049	25%
Japan	1,614	1,273	1,569	23%
France	1,146	1,088	1,247	15%
United Kingdom	874	652	851	31%
Korea, South	855	699	775	11%
Italy	387	470	697	48%
Spain	317	387	669	73%
Netherlands	416	476	645	36%
Germany	705	689	642	-7%
Hong Kong	361	269	364	35%
All Others	1,233	1,070	1,312	23%

Source: Derived from World Trade Atlas

Salmon, Whole / Eviscerated

**Salmon, Whole or Evisc. - Canada - Imports -Total-
Quantity
metric tons**

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	21,807	19,323	14,556	-25%
United States	19,291	17,432	12,182	-30%
Chile	1,264	1,006	1,011	0%
China	29	82	668	710%
Ireland	134	108	147	36%
Norway	60	64	114	77%
India	122	90	114	27%
Russia	13	3	68	2583%
Philippines	140	173	47	-73%
All Others	754	365	206	-44%

**Salmon, Whole or Eviscerated - Canada - Exports -
Quantity
metric tons**

January - December				
Country	2004	2005	2006	% Change - 06/05 -
-- The World --	70,203	92,626	95,290	3%
United States	53,032	67,769	78,482	16%
Japan	6,364	7,764	5,249	-32%
China	2,037	4,924	2,376	-52%
Taiwan	1,652	2,824	2,191	-22%
Spain	1,756	1,647	1,393	-15%
Italy	1,154	1,208	1,091	-10%
Hong Kong	354	813	806	-1%
France	615	626	759	21%
Netherlands	302	432	417	-3%
Germany	430	547	373	-32%
Thailand	458	806	274	-66%
Ukraine	42	154	263	71%
All Others	2,005	3,112	1,616	-48%

Source: Derived from World Trade Atlas

Canned Salmon

Canned Salmon - Canada - Imports -Total-
Quantity
metric tons

January - December				% Change
Country	2004	2005	2006	- 06/05 -
-- The World --	18,037	19,444	16,975	-13%
United States	17,709	18,755	16,095	-14%
China	87	231	441	90%
Thailand	151	294	309	5%
Chile	45	71	50	-30%
Denmark	21	49	43	-12%
Norway	12	28	24	-13%
Philippines	-	8	6	-25%
Italy	1	1	2	32%
United Kingdom	2	1	1	-2%
All Others	9	6	4	-35%

Canned Salmon - Canada - Exports -
Quantity
metric tons

January - December				% Change
Country	2004	2005	2006	- 06/05 -
-- The World --	8,283	7,066	6,663	-6%
United Kingdom	3,225	2,555	2,270	-11%
Australia	1,462	1,240	1,137	-8%
Belgium	857	798	873	9%
New Zealand	1,394	1,117	842	-25%
United States	284	464	448	-3%
Ireland	233	264	274	4%
Hong Kong	-	-	206	-
Italy	210	185	171	-8%
Netherlands	250	111	121	9%
Japan	112	66	75	14%
China	-	-	71	-
Trinidad & Tobago	1	15	42	183%
All Others	0	0	0	-47%

Source: Derived from World Trade Atlas

Policy

On behalf of the Government of Canada, the Department of Fisheries and Oceans (DFO) is responsible for developing and implementing policies and programs in support of Canada's scientific, ecological, social and economic interests in oceans and fresh waters.

The Department's guiding legislation includes the *Oceans Act*, which charges the Minister with leading oceans management and providing coast guard and hydrographic services on behalf of the Government of Canada, and the *Fisheries Act*, which confers responsibility to the Minister for the management of fisheries, habitat and aquaculture. The Department is also one of the three responsible authorities under the *Species at Risk Act*.

Acts and Regulations (linked)

[**Atlantic Fisheries Restructuring Act**](#)

[**Canada Shipping Act**](#)

[Aids to Navigation Protection Regulations](#)

[Boating Restriction Regulations](#)

[Competency of Operators of Pleasure Craft Regulations](#)

[Eastern Canada Vessel Traffic Services Zone Regulations](#)

[Pleasure Craft Sewage Pollution Prevention Regulations](#)

[Private Buoy Regulations](#)

[Sable Island Regulations](#)

[Small Vessel Regulations](#)

[Vessel Traffic Services Zone Regulations](#)

[**Canada Shipping Act, 2001**](#)

[**Coastal Fisheries Protection Act**](#)

[Coastal Fisheries Protection Regulations](#)

[**Department of Fisheries and Oceans Act**](#)

[**Financial Administration Act**](#)

[**Fisheries Act**](#)

[Aboriginal Communal Fishing Licences Regulations](#)

[Alberta Fishery Regulations, 1998](#)

[Atlantic Fishery Regulations, 1985](#)

[British Columbia Sport Fishing Regulations, 1996](#)

[Fish Health Protection Regulations](#)

[Fish Toxicant Regulations](#)

[Fishery \(General\) Regulations](#)

[Foreign Vessel Fishing Regulations](#)

[Manitoba Fishery Regulations, 1987](#)

[Marine Mammal Regulations](#)

[Maritime Provinces Fishery Regulations](#)

[Management of Contaminated Fisheries Regulations](#)

[Metal Mining Effluent Regulations](#)

[Newfoundland and Labrador Fishery Regulations](#)

[Northwest Territories Fishery Regulations](#)

[Ontario Fishery Regulations, 1989](#)

[Pacific Fishery Management Area Regulations](#)

[Pacific Fishery Regulations, 1993](#)

[Pulp and Paper Effluent Regulations](#)

[Quebec Fishery Regulations, 1990](#)

[Saskatchewan Fishery Regulations, 1995](#)

[Yukon Territory Fishery Regulations](#)
[**Fisheries Development Act**](#)
[**Fisheries Improvements Loan Act**](#)
[**Fishing and Recreational Harbours Act**](#)
[Fishing and Recreational Harbours Regulations](#)
[**Freshwater Fish Marketing Act**](#)
[**Great Lakes Fisheries Convention Act**](#)
[**Oceans Act**](#)
[Basin Head Marine Protected Area Regulations](#)
[Eastport Marine Protected Area Regulations](#)
[Endeavour Hydrothermal Vents Marine Protected Area Regulations](#)
[Gilbert Bay Marine Protected Area Regulations](#)
[Gully Marine Protected Area Regulations](#)
[Musquash Estuary Marine Protected Area Regulations](#)
[**Species at Risk Act**](#)

Marketing

Fish and Seafood

Fish and fish products are subject to the Fish Inspection Act and Regulations, which contain requirements for wholesomeness, labeling, packaging, grading, and health and safety. Enforcement is carried out by the Canadian Food Inspection Agency (CFIA). The CFIA also enforces Canada's Food and Drugs Act and Regulations as they pertain to fish and seafood in the Canadian marketplace.

There is no requirement under current regulations for imported fish products to be accompanied by a health certificate. However, the person who imports fish into Canada must hold a fish import license, must provide written notification to the CFIA for each imported shipment of fish and must make the fish available for inspection. Product inspections are conducted at frequencies that depend on the product's risk and the exporter's history of compliance. The normal inspection frequency for fresh fish such as wild caught salmon from an exporter with a good history of compliance would be 2%. More information regarding the requirements to import fish into Canada can be found on the CFIA web site in the document titled Guide to Canadian Regulatory Requirements and Examination Procedures for Imported Fish. <http://www.inspection.gc.ca/english/anima/fispoi/import/importe.shtml>

Labeling requirements for packaged fish must include all mandatory information normally found on consumer packages such as:

- country of origin
- common name of the fish;
- name and address of the manufacturer;
- day, month and year of processing; and
- quantity (metric or imperial units)

Information regarding the labeling of fish products is available on the CFIA web site at: <http://www.inspection.gc.ca/english/fssa/labeti/guide/tab15e.shtml>

Canadian Importers Database

Industry Canada's (IC) Importers Database provides U.S. fish and seafood companies a useful tool for identifying major fish and seafood importers in Canada. Electronic searches can be made via HS codes or product descriptions. Listed below is a sample of the database showing the search results for frozen fish fillet importers. The IC web page is: http://strategis.ic.gc.ca/sc_mrkti/cid/engdoc/index.html

Product: 030420 - FISH FILLETS AND OTHER FISH MEAT - FROZEN

Market Concentration Summary - All Canada (2005)		
Number of Importers	Value of Imports (\$CDN)	Cumulative % of Imports
3	76,871,897	36.29
6	103,821,740	49.02
10	123,650,931	58.38
15	140,970,056	66.56
20	152,930,399	72.20
25	162,904,483	76.91
29	169,739,521	80.14
All	211,805,954	100.00

Major Canadian Importers 1/ in 2005

Company Name (alphabetical order)	City	Province 2/	Postal Code
AQUA STAR	Woodbridge	Ontario	L4L 4H7
ARCTIC SEAS LLC	Little Compton	Rhode Island	
BLUEWATER SEAFOODS INC./ FRUITS DE MER BLUEWATER INC.	Lachine	Quebec	H8T 2N1
CALKINS & BURKE LIMITED	Vancouver	British Columbia	V6G 2Z6
COMMERCE SOLINE LTEE	Saint-Laurent	Quebec	H4S 1V1
D. JAY ENTERPRISES INC.	Bellingham	Washington	
EXPORT PACKERS COMPANY INCORPORATED	Brampton	Ontario	L6T 5K5
EXPORT PACKERS COMPANY LIMITED	Brampton	Ontario	L6T 5K5
F P I -USA	Riverport	Nova Scotia	B0J 2W0
FAMILY TRADITION FOODS INC	Wheatley	Ontario	N0P 2P0
GLACIER FISH COMPANY LLC	Seattle	Washington	
HAI YANG INTERNATIONAL INC	Toronto	Ontario	M4S 2Z2
HENRY H MISNER LIMITED	Port Dover	Ontario	N0A 1N0
INTEGRA FOODS INTERNATIONAL CORP.	Shawnigan Lake	British Columbia	V0R 2W0
JANES FAMILY FOODS LTD.	Mississauga	Ontario	L4V 1C7
MCLEAN BROTHERS FISHERIES INC	Wheatley	Ontario	N0P 2P0
NATIONAL SEA PRODUCTS	Lunenburg	Nova Scotia	B0J 2C0
OCEAN FISHERIES LIMITED	Vancouver	British Columbia	V5L 1A4
PACIFIC SUNRISE INTERNATIONAL CORP	Mercer Island	Washington	
PREMIUM SEAFOODS LIMITED	Arichat	Nova Scotia	B0E 1A0
PRESTEVE FOODS LIMITED	Wheatley	Ontario	N0P 2P0

Company Name (alphabetical order)	City	Province 2/	Postal Code
S.M. PRODUCTS (B.C.) LTD.	Delta	British Columbia	V4K 3N2
SOGELCO INTERNATIONAL INC	Montréal	Quebec	H2Y 2H7
TAI FOONG INTERNATIONAL LTD/TAI FOONG INTERNATIONAL LTEE	Toronto	Ontario	M1X 1E6
TJ DISTRIBUTION	Calgary	Alberta	T2G 1Y6
TOPPITS FOODS LTD	Woodbridge	Ontario	L4L 4S5
TRADEX FOODS INC.	Port Alberni	British Columbia	V9Y 4A3
TRIDENT SEAFOOD CORPORATION SEATTLE WASHINGTON	Seattle	Washington	
WESTFAIR FOODS LTD.	Calgary	Alberta	T2P 2H9

Notes:

1 - The 'Major Importers' listed comprise those which collectively account for the top 80% of all imports (in terms of \$C value) of the selected product for all of Canada. This list does not include individuals. The importer is not necessarily the end-user of the product.

2 - In the case of non-resident importers with addresses outside of Canada, the U.S. state is displayed if applicable and the postal code is left blank.

Source: Industry Canada, based on 2005 data collected by the then Canada Customs and Revenue Agency (Revenue Canada)